

THE CONSULTING ROLE

Internal and External Consulting

Matters of Principles, Ethics, and Standards of Professional Conduct

- Disclosure
- Client's interests
- Competence

Experience

- single media
- multi media
- other

Education and Training

Skills

Accepting only engagements for which qualified

- Confidentiality

Privileged Information – Scope of Engagement

- Conflict of Interest

Serving competitors without client's knowledge

- Independence, Impartiality, and Objectivity

- Reasonable Fees

Not paying commissions

Disclosing commissions

Competitive bids

- Documentation

Maintaining appropriate files

- Reviewing Other Consultant's Work

- Individualized Performance

- Training Client Personnel

Working out of a job

Additional Considerations

- Defining the Problem (the job, the project, the engagement)
- Deliverables

Findings, Conclusions, Recommendations

Reports, Information, Ideas

- Project vs Process Consultation

Defined Scope

Open-ended, “Sounding Board”

Formal and Informal

- Recommendations vs Decision Making

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